

Service Providers

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# Industry Brief

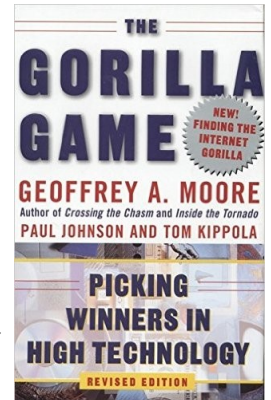
## The Gorilla Game: MSPs Identifying Super Performing Cloud Services

Featuring  
Enterprise Storage-as-a-Service  
Zadara Storage

# The Gorilla Game

## Picking Winners in High Technology

The “Gorilla Game” is the challenge for investors to identify potential super performers of tomorrow before their stock becomes highly valued in the marketplace. In his book, “Gorilla Game”, Geoffrey Moore writes that most people are familiar with calculations such as “if you invested \$10,000 in Microsoft stock in 1986 when it went public, your stock would now be worth more than \$1.8M.” The author points out the strategy is to look for areas of hyper-growth, find the dominant players (Gorillas) in these spaces, and gradually concentrate on a few.



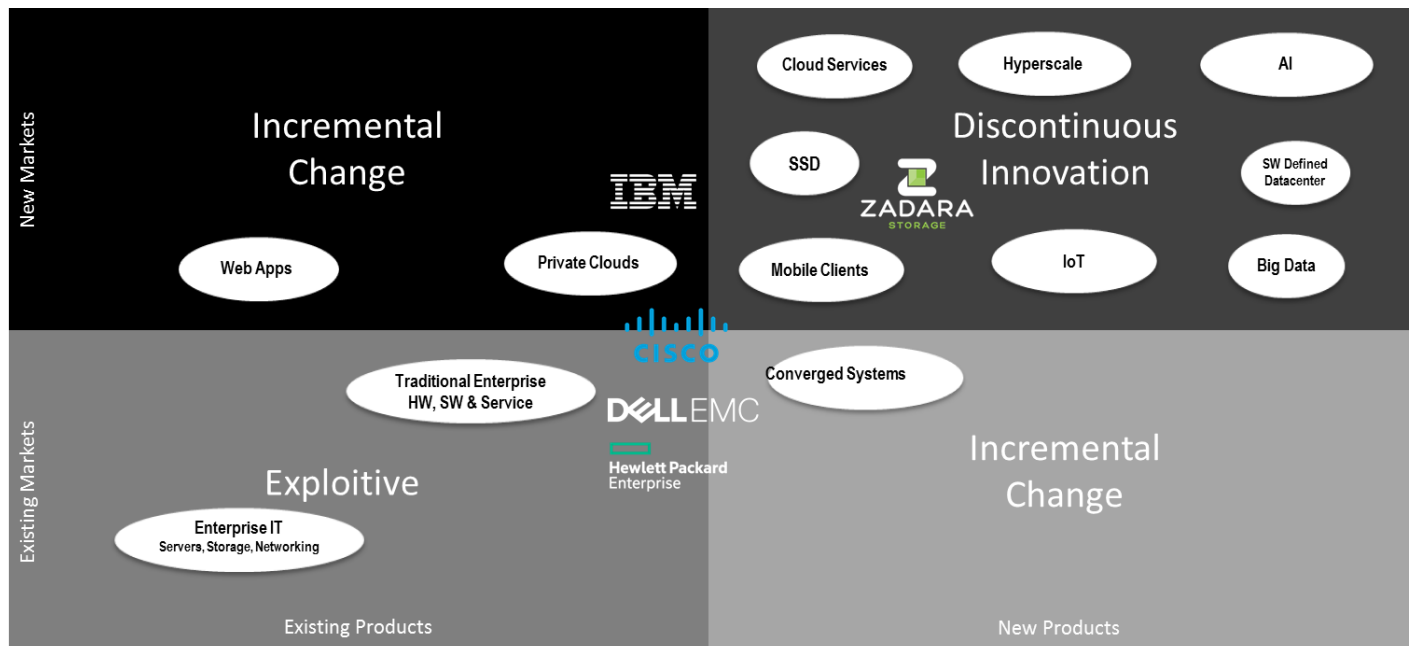
Cloud Service Providers and Managed Service Providers are also playing the Gorilla Game as they look for areas of hyper-growth, find the dominant technology players, and concentrate on a few—all to identify super performing services before the competition does.

For investors and service providers, the way to win the Gorilla Game is to identify:

- Discontinuous innovation—breakthrough trends which offer such compelling benefits that new standards and operating models are quickly developed to help the trend succeed.
- Companies that provide new products or services that can bring about a sea-change in how IT does business, where new supply chains and new efficiencies can bloom quickly and create enormous economic value.

### Discontinuous Innovation

Radical advances that profoundly alter the basis for competition



Cloud services are among the radical advances in information technology which have altered the basis for competition in the industry. Within the cloud services market, Zadara Storage is a company that is bringing about a sea-change in how enterprise storage is being delivered and consumed in private and public clouds.

# Hyper-Growth & Sea Change

## Discontinuous Innovation: Enterprise Storage-as-a-Service

A key strategy in the Gorilla Game is to look for areas of hyper-growth. IT Brand Pulse believes enterprise storage-as-a-service fits the description because it's on a trajectory to grab half of all enterprise storage revenue by 2020. "Public cloud" storage-as-a-service is growing at approximately 25% per year, and **by 2020 will capture 25% of the massive \$50 billion** in enterprise storage spending. "On-Premises-as-a-Service" (OPaaS) is a new class of IT set to take-off and grab another 25% of enterprise storage spending by 2020. There are two reasons why the on-premises-as-a-service model will ascend: a) it represents the best of two worlds. Infrastructure stays on premises, and IT pays only for what they use, and b) enterprise IT leaders such as Dell EMC, HPE and Microsoft have validated the market with on-premises-as-a-service compute and storage offerings.

### The Enterprise Storage Industry is at a Major Technology Inflection Point



Andy Grove's model for a technology inflection point fits perfectly for enterprise storage. Cloud service providers who are quick to adopt storage-as-a-service are going on to new heights, while business for traditional enterprise storage is declining.

## A Company Bringing About Sea Change: Zadara Storage

In 2006, Amazon introduced S3 the first successful storage service aimed at businesses, launching a whole new era of cloud computing. A decade later, the enterprise infrastructure market almost completely bifurcated into traditional on-premise enterprise infrastructure and off-premise public cloud computing. However, in 2011 Zadara Storage came onto the scene. The company offered a more capable, higher performance enhancement to AWS and blended the best of public and private cloud worlds to create a third category: OPaaS. Zadara Storage enables organizations to select Storage-as-a-Service from any global location (cloud/hybrid/on-premises), any data type (block, file, object), and any protocol (FC, iSCSI, iSER, NFS, CIFS, S3, Swift) with all of the enterprise-class data protection features they would expect from traditional, CapEx-based storage arrays. With Zadara multi-cloud concurrent access, users get the flexibility to connect to the most appropriate service, as needed. Most recently, Zadara has introduced innovative cloud hydration services to get static or live production data efficiently to the cloud.

# Get in the Game Now

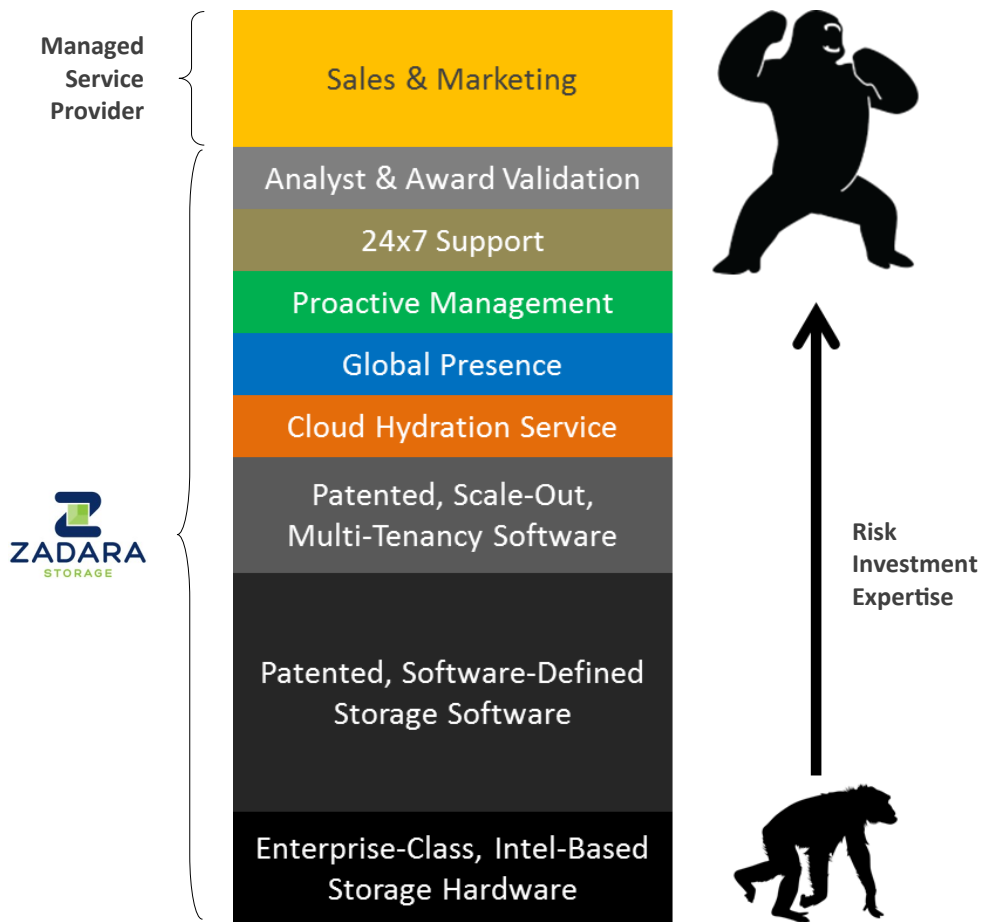
## By Partnering with a High-Value-Add Service Provider like Zadara

If you're not offering enterprise storage-as-a-service, or if you're an MSP representing a major public cloud service provider, partnering with a high-value-add service provider like Zadara is the best way to get in the Gorilla Game now.

Zadara offers more comprehensive storage services than the big three players and is available to you now, with no capital investment. A partnership with Zadara allows you to avoid the massive investment and risk involved with building a competitive product including, hardware, software, and a skilled support organization.

Just add your sales and marketing to the Zadara stack, and you're instantly competing with a best-in-class enterprise storage service offering.

### What it takes to be an Enterprise Storage-as-a-Service Gorilla (and how you can get in the game now)



Several major IT vendors have abandoned cloud services after learning the hard way the "whole product" spans multiple layers of technology, support, business relationships and global regions. A much safer, and more profitable way to offer best-in-class enterprise storage-as-a-service is to partner with a leader like Zadara.

# The Bottom Line

## Zadara Storage

There are four trends which define what the future of enterprise storage looks like...and one company is already there.

- **OpEx**—Zadara Storage pioneered enterprise storage-as-a-service, and is one of a small handful of service providers with OpEx offerings available in the public cloud, on-premises and hybrid configurations.
- **All Flash**—The company is leading the way to all-flash storage in a partnership with Intel. With Zadara, your customers can deploy SSD storage services for the same price as high-performance HDD storage.
- **Software-Defined**—Zadara Storage is agile because the company has developed a software defined storage platform which is the most efficient way to deliver new storage technology.
- **AI**—IT Brand Pulse expects Zadara Storage to be a leader in the development of enterprise storage with artificial intelligence, starting with predictive analysis.

## The Bottom Line

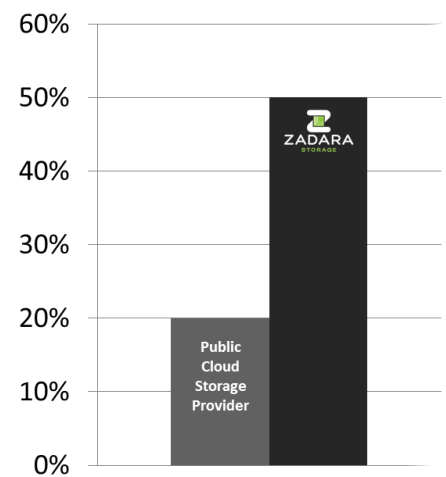
The way to win the Gorilla Game is to identify super performing services before the competition does, and partner with companies that can create enormous economic value. The bottom line is Zadara Storage is an incumbent leader in an explosive market, and promises to drive profitable growth for MSPs that offer Zadara enterprise storage-as-a-services.

## The Author



Frank Berry is founder and senior analyst for IT Brand Pulse, a trusted source of testing, research and analysis about cloud IT infrastructure, including operating platforms, servers, storage and networking. As former vice president of product marketing and corporate marketing for QLogic, and vice president of worldwide marketing for the automated tape library (ATL) division of Quantum, Mr. Berry has over 30 years experience in the development and marketing of IT infrastructure. If you have any questions or comments about this report, contact [frank.berry@itbrandpulse.com](mailto:frank.berry@itbrandpulse.com).

### Storage-as-a-Service MSP Gross Margin



Offering Zadara storage services yields far greater gross margins than commodity public cloud storage.